

A Work Project, presented as part of the requirements for the Award of a Masters

Degree in Management from the Nova – School of Business and Economics

Social Entrepreneurship Project “Na Porta ao Lado”: Strategic Plan

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#820

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1. Abstract

“Na Porta ao Lado” (NPL) is a social project with the main objective of mitigate the isolation problem by bringing elderly people and neighborhood families together through a relationship of trust, where families can educate their children for this issue and the elderly can feel safe and increase their quality of life. This study proposes different strategies and aim to increase the chances that the pilot leads to the desired results. Besides, this strategic plan can also be valuable to parishes, institutions or non-profit organizations (NPO) that want to solve the same problem.

Key words: elderly isolation problem, inclusive community, social entrepreneurship, strategic plan.

2. Purpose of the project

The social entrepreneurship project “Na Porta ao Lado” emerged from the Social Entrepreneurship course taught in the Management Master at NovaSBE. In that course it was purposed the creation of an innovative solution to tackle a social problem. By our experiences and from the most recent news, the problem selected was the elderly isolation in urban areas. After analyzing the causes of the problem, the stakeholders and the benchmarking we defined the solution with the aim to bring elderly people and neighborhood families together within a relationship in order to tackle elderly social exclusion and, as a consequence, prevent their isolation. NPL target the elderly who live alone in the urban area of Lisbon, who seek for ways to be better integrated in society and want to have support. This solution intends to prevent having no one responsible for the elderly, which allows them to have not only a regular but also an emotionally contact as well as to increase their safety and its perception, prevent loneliness and

integrate them in the community. At the end of the semester, our group presented the solution to a jury from different institutions such as Fundação Calouste Gulbenkian, Fundação EDP and NovaSBE. The positive feedback from the professor Miguel Alves Martins and from these institutions, and the validation of the prototype, brought us more motivation to continue the project hereafter and define the next steps. To prove the relevance of the theories that we defined before, we decided to implement a pilot of the project to study four relationships between an elderly from Nossa Senhora de Fátima (NSF) parish and a volunteer family during six months. The choice of the parish was based on the needs of the population and to frame in the project “O nosso km²”¹ promoted by F. C. Gulbenkian. To define priorities and increase the chances that the pilot leads to the desired results, it is fundamental to build a Strategic Plan. The purpose of this thesis is exactly the Strategic Plan. It will support the decision, specific priorities, build commitment and guide the allocation of resources by analyzing the environment, and defining the future strategies. Furthermore, the plan supports the executive board members of the project to address some issues and give credibility to the main stakeholders. Besides, this plan and the pilot implementation if it is validated, could be a valuable knowledge to parishes, institutions or NPO that want to solve the same social problem.

3. Literature Review

With the current economic crisis and the increasing changes in the society, governments and companies do not have resources to solve all social problems and satisfy people needs. However, “social entrepreneurs find what is not working and solve the problem

¹ “O nosso km²” is a project promoted by a human development program from F. C. Gulbenkian with the aim to mitigate the isolation problem and the lack of neighborhood relationships in the NSF Parish by promoting and building conditions to increase the community and solidarity spirit. More information in Gulbenkian April 2012 Newsletter: http://www.harpa-portugal.com/nlgulbenkian_abril2012.pdf.

by changing the system, spreading the solution, and persuading entire societies to take new leaps” (Ashoka webpage, 2012); they also create “a unique approach that is both evolutionary and revolutionary, operating in free market where success is measured not just in financial profit but also in the improvement of quality of people's lives” (Nicholls A., 2006). According to Gregory Dees, the main characteristics that differentiate a normal business from a social enterprise is the “social objective”; “Social enterprises blend social and commercial methods (...) [that] look for creativity ways to generate revenue, like business”. In the case of NPL the project has the social objective, and after proving the validation of the pilot, it wants to generate revenues in a creativity way.

“Clarify of direction in the not-for-profit sector is just as critical for success as it is in the for-profit sector. Without it, focus and clear sense of purpose for those connected to the organization will slowly wither, along with any changes for success.” (Gregory Dees J., 2002) To help the organization “keep them eyes on the horizon in order to anticipate tomorrow's opportunities” (Gregory Dees J., 2002) and “help leaders to be intentional about priorities and proactive in motivating others to achieve them” (Allison M. and Kaye J., 2005), a strategic plan is an essential tool. According to Gregory Dees J. "strategic planning is the compass or roadmap for the organization (...) and creates the opportunity for the social entrepreneur and board to get "outside the box" of day-to-day operation.” (Gregory Dees J., 2002). Several organizations typically use only the strategic plan, however some use the business planning “to include not only strategies and goals but also detailed (at least three years’ worth) projections for revenues and expenses” (Allison M. and Kaye J., 2005). The “elements of strategic planning are always part of a complete business planning process” (Gregory Dees J., 2002) that usually “is used by business owners to convince existing and potential investors and

leaders (the audience of traditional business plan) that the business activity will generate enough money to pay a return or to pay back loan" (Allison M. and Kaye J., 2005).

"A business model makes sense for a non-profit that generate revenues", but "most non-profits are unable to provide the kind of detail anticipated in business plans because of unpredictability of revenues flows" (Allison M. and Kaye J., 2005). The strategic planning is the focus of this thesis instead of a business plan since NPL is a startup project with the aim to implement only a pilot in the short term, without any business model and predictable revenues. Hereafter, the business plan will be important for the project, but only when the pilot assumptions are proved and the scale up process.

4. Framework and Methodology

The strategic plan framework is based on different authors, and it was adapted to the dimension and purposes of the project. In this work project there will be used different methodologies: studies and surveys by CESSS² and FCSH³ data; interviews and meetings with local residents (interviews in a particular house and meetings in a context of "o nosso km²"); contacts and meetings with local institutions and partners (ACA⁴, FITI⁵, Social Support by NSF⁶ congregation, PSP⁷, Project "Intergerações" from SCML⁸, Lar Rainha Maria II, ADAS⁹, ASAS¹⁰ and NovaSBE); volunteer training from ACA and "Ageing and Social Innovation" conference at 19-20 of November 2012 in F. C. Gulbenkian. The interviews were conducted with a structure but as conversations and

² Centro de Estudos de Serviço Social e Sociologia

³ Faculdade de Ciências Sociais e Humanas – Universidade Nova de Lisboa

⁴ Associação Coração Amarelo

⁵ Federação das Instituições de Terceira Idade

⁶ Nossa Senhora de Fátima

⁷ Polícia de Segurança Pública – Esquadra do Rego

⁸ Santa Casa da Misericórdia de Lisboa

⁹ Associação para o Desenvolvimento e Apoio Social para do Bairro do Rego

¹⁰ Associação e Serviço de Apoio Social – Bairro de Santos

open discussions to be easier for the stakeholders to express themselves without any concerns; that was also the reason why no interview was recorded.

5. Strategic Plan

Different authors suggest different conceptual frameworks and processes to build a strategic planning to NPO. However, each framework depends on the type of the organization and its maturity stage. In the case of NPL, the framework has to be simple and includes only the tools that fit in a small and pilot project.

5.1. Plan to Plan

The planning to plan step will clarify the specific issues and options to guide the strategic plan. At the end of the strategic plan it is crucial to understand how the organization can have greater impact, be more sustainable, what are the resources needed to implement the project, and if the administrative organization has capacity to efficiently support the organization. Regarding short-term, several issues should be considered in the strategic plan to successful implement the pilot such as how many volunteers are needed in the staff board, how to communicate the project, how to attract volunteer families, and how the community will engage in the process. As Richard A. Mittenthal presents in the briefing paper “Ten keys to successful strategic plan for Nonprofit and foundation leaders”, the strategic plan should be an inclusive approach and involve entirely the stakeholders.

a) Stakeholders

Who	Contribution	Gain	Involvement on Strategic Plan
Internal Stakeholders			
Board of Directors	Time, commitment, business know-how	Feeling of helpfulness, spirit of community, experience.	Agreement of future strategies; Perception and opinion about the actual programs
Staff Members	Time, commitment, experience know-how	Feeling of helpfulness, new experience, participation on the community	Agreement of future strategies. Opinion about future and actual strategies
Advisory Board	Practical know-how and advices	Involvement in an innovative project	Perception and opinion about the actual programs and future strategies
External Stakeholders			
Beneficiaries – who feels alone in the target area	Willing to be helped - maybe they are inhibited to accept support like they are inhibited to leave home	Better quality of life and health, increase of security and less time spent alone	Understand the needs, preferences, and the relevance of the different programs for the beneficiary;
Families of the Beneficiary	Support the participation of the elderly in the program and follow the project	Relief on elderly safety	Understand their opinion about the strategies, and about the involvement of their family members in the project.
Volunteer Families	Time, commitment and availability to help in small activities	Feeling of helpfulness, spirit of community, and opportunity to educate the children	Understand the availability to participate in the volunteer project and the barriers of the relationship
Community	Time, actions and commitment	Better integrated society	Inform and understand the needs of the local community and the possible involvement in the project
Funders and Government	Partnership and Financial Support	Marketing, value creation, community equality and better living conditions	Understand the requests needed to get financial support, inform and get involved to increase the relationship.
Partners and local Institutions	Information, experience, credibility and communication	Pooling partnerships, better fulfil their mission and reducing costs	The availability to be our partner by sharing activities, programs and resources.

Table 1: Stakeholders Analysis

5.2. Mission, Vision and Value Proposition

In Portugal, elderly population who lives alone increased 28% in the last decade. Nearly 400 thousand elderly live alone and 804 thousand live with another elderly with more than 65 years.¹² The increase of life expectancy, desertification and the change of families' roles in the society explain the increase of the problem and the differences

between regions¹¹. In Lisbon live 518 069 elderly people (more than 65 years) and 62% live alone. In the NSF parish, 63% of the elderly live alone.¹²

The main purpose of NPL is to allow the elderly to have not only a regular contact with a volunteer family, but increase elderly quality of life, health, safety and its perception, prevent loneliness, provide a personal relationship, integrate them in the community, aware the family and future generations that is fundamental to take care of elderly people and increase a community spirit. In the weekly contact the family will have the possibility to help the elder in simple activities: leave home to walk in the park, read a book, shop in the supermarket, change the lamp and also the elder can tell stories to the kids, share experience or teach cooking. The activities depend on both parts needs and interesting. To accomplish its purpose, NPL wants to create a local networking that engage and educate local commerce, institutions and residents to identify the elderlies isolated or the ones that need some support, and increase visibility of the different solutions to solve this problem. Furthermore, the campaign goal is also to inform and engage people to support this elderly by being a volunteer. Moreover, NPL wants to study an innovative solution, prove the validation of theory, scale up for more parishes and consolidate a networking base that signalize in the present and in the future. The goal is to allocate an elderly to a volunteer family that is geographically close and has similar profiles. The board believes that greater engagement in the community increase safety and quality of life of the elderly people and in the decrease of the isolation problem if each individual looks for the next door- neighbor.

a) Vision – Signalize all elderly people who feel isolated by a community networking and give information about appropriate institutional support and different solutions in

¹¹ Media information “Mais de um milhão e duzentos mil idosos vivem sós ou em companhia de outro idoso”, February 2012, Instituto Nacional de Estatística

¹² Censos 2011, INE

the parish. And allocate to an elder a volunteer family geographically close or a volunteer from another parish, contributing to decrease the isolation feeling.

b) Mission - Eliminate elderly isolation by facilitating a relationship between elderly and community families, tackling social exclusion.

c) Value Proposition - To elderly who live alone at the NSF parish, who seek for ways to be better integrated in society and/or want to have support, this project provides them a solution to prevent having no one responsible for them, allowing the elderly to have not only a regular contact, but increase elderly safety and its perception, prevent loneliness, provide a personal relationship and integrate them in the community, instead of just providing a neither personal nor a regular basis contact.

5.3. Environmental Scans and Assessments

a) Swot Analysis

Internal Forces	External Forces
Strengths: <ul style="list-style-type: none"> • Youth executive board with management knowledge and high commitment; • No costs for the beneficiaries, and benefits for both parties (beneficiaries and volunteer family); • Innovative solution; • Reinforcement of neighborhood spirit; • Signalization of isolation cases by several tools and contacts; • Communication and interaction with local institutions that already support ageing and with experience in the field; • Strong Partnership with ACA. 	Opportunities: <ul style="list-style-type: none"> • Active ageing – experience and expertise of the elderly; “Active young elderly”¹³ in the community; • Intergenerational relationships; • New technologies; • Business opportunities – health care, transports, food, housing and culture; • Receptive local institutions to cooperate with the project; • Volunteer community in NovaSBE; • Three religions centers in the parish; • Majority of community is catholic; • Two universities in the parish.

¹³ “Active young elders” mean an individual with more than 65 years, with an active life, high capacity of mobility and empowerment in the community.

<p>Weaknesses:</p> <ul style="list-style-type: none"> • High dependency of the executive board commitment; • No staff or volunteer team with diversified background – without social education; • Lack of experience in the social sector and with the target group; • Limitation of governance capacity; • No credibility among the community and if the team fails to pass this image of trust is very difficult to succeed; • Difficulty to engage volunteer families with profile for the project – the success of the relationship is fundamental to increase credibility in the future; • No physical institution to represent the project in the field. 	<p>Threats:</p> <ul style="list-style-type: none"> • Financial crisis – reduction of income; • Increase of dementia and long-term diseases; • Negative stereotypes – between different generations; • Lack of neighborhood spirit; • Lack of objectives and extra activities - Distrust in the future; • Ignorance about the local services and support; • Difficulty to identify the isolated people; • Physical barriers in the urban areas and also at own house – inability to leave home alone.
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Table 2: Swot Analysis

b) PEST Analysis

The most relevant conclusions in this analysis are in the Swot. See Annex A for a detailed description of the PEST Analysis.

c) Porter's five forces Analysis

Michael Porter developed the Five Forces Model to analyze competitive rivalry for profit organizations by evaluating the power of buyers, suppliers, threats of new entrants, substitutes and industry rivalry. However, this model has been applied for NPO with slight modifications “to understand its environment relative to other similar organizations and key stakeholders. It helps the NPO understand the strength of its current position, and the strength of a position it is considering moving into.”¹⁴

Competitive rivalry

¹⁴ PM Carson Consulting, 2010. Real time – Social impact advisors.
http://www.realtimeadvisors.com/uploads/6/5/1/0/6510177/5_forces_in_npo.pdf

The industry rivalry describes the competition between NPO for donors, corporate sponsorship, government grants and consumers. The direct competitor which offers similar services in the same field is ACA, and the indirect competitor is MPMV¹⁵ which offers similar services in a different parish council. ACA¹⁶ is an IPSS¹⁷ with 12 years of experience in the field. The organization works in eight different cities all over Portugal with 700 volunteers and enjoys the support of larger organizations and companies such as SCML, Social Security, F.C. Gulbenkian, BES¹⁸ and Montepio. MPMV¹⁹ is a project in the parish São Nicolau. It is a small organization which cares of 84 elders with three full-time social experts and it is supported by Montepio, F.C. Gulbenkian and F. PT.

NPL as a startup project does not have any financial support, but in the future it will compete by similar funds and institutional supports. Consequently as many projects exist higher is the rivalry. However, in the third sector, the rivalry should be positive since all organizations have the same mission. As a way to reduce this high rivalry for funds, the competitors should join strengths, create partnerships and supply better services to better fit their mission, by sharing resources and information.

Power of suppliers

The power of suppliers concept applied to the NPO can include as suppliers the government organizations, local partners or providers of goods and services. The main suppliers of the project are the partners, which in the pilot implementation have a

¹⁵ Mais Proximidade Melhor Vida

¹⁶ ACA is an IPSS created in 2000 with the main mission to mitigate the isolation problem by allocate a volunteer to an isolated person, and follow the weekly meetings - <http://www.coracaoamarelo.org/>

¹⁷ Instituição Particulares de Solidariedade Social

¹⁸ Banco Espírito Santo

¹⁹ MPMV is located in São Nicolau parish and also wants to mitigate the isolation problem by regular contact, support in outside exits and health control and promotion of cultural activities - <http://www.maisproximidademelhorvida.com>

relevant value for the project. However, NPL does not depend on them; they are replaceable but it can be difficult to change providers due to administrative costs, program continuity and damage credibility among the community. In the future, with higher sustainability, the NPL will not be so dependent of partners, since it will have its own resources. Volunteers are also a relevant supplier for the project, since the continuity of the project and the success of the relationship depends on them.

Power of buyers

“For NPO the term “buyers” can be defined widely to include consumers, donors, government and philanthropic funders, corporate sponsors and partners.”²⁰ The service supplied by the project is free and is built to satisfy the needs of the beneficiaries. To attract and maintain the beneficiaries, the project has to give them power and understand their opinion to improve the service. With the economic crisis, the pool of donors’ decreases and the State cannot contribute as usual. With the decrease of donations and donors, the institutions become more financially dependent; therefore, to be more independent of donations the organizations have to achieve financial sustainability by themselves.

Threats of substitutes

Concerning service substitution the switching cost is high, since it is created a relationship between the elderly and the volunteer family. As soon as the relationship is strong, to change to another volunteer is harder and difficult for the beneficiary. However if the beneficiary is not satisfied, he can change to another organization. In the NSF Parish, he could change to ACA, to a similar support supplied by the NSF

²⁰Tracey Lloyd, 2010. <http://suite101.com/article/using-porters-five-forces-to-analyse-non-profit-industry-a322704>

congregation or retirement home. Moreover, it should also be considered the likelihood of a donor to switch to a competitive project. According the interview made to a F. C. Gulbenkian's representative, the supports given by the foundation depends on the causes solved by the project (they only support institutions which a specific cause related to the mission of the foundation) and during a limited time (maximum 3 years).

Threat of new entrants

With new entrants, the competition for funds increases, but also the impact on the society. The existing causes and the high fixed costs can be a barrier to entry; conversely, the startup project does not have fixed costs but when the project scales up the threats may increase. Besides fixed costs, the credibility of the project among the elder community is one the biggest barriers, since the beneficiaries and also the families will only participate in a new project if they trust and if the project has credibility.

From the Five Forces Analysis, the main conclusions that should be considered in the future are the creation of partnerships and specializations (each project could supply different services to optimize the quality) to reduce high rivalry; the creation of different financing alternatives such as social business to reduce the power of buyers; ensure different partners and volunteers to reduce the independence of suppliers; and build credibility and trust among the elder population to increase the barrier of new entrants.

5.4. Agree on Priorities

Until now the environment assessment of the project with the identification of strengths and weaknesses, the evaluation of clients' needs and the external market data have produced enough information to analyze and align the strategies choices to the mission

and vision of the project. In the “Agree on Priorities” step, it is time to choose a course of directions by reviewing the data and developing a future program portfolio. To support the decisions it will be used the Swot Analysis Grid and the Competitive Strategic Matrix.

a) Swot Analysis Grid

	Opportunities	Threats
Strengths	Invest <ul style="list-style-type: none"> • Active young elders with capacity to empower the community and volunteers; • Build the organization team and volunteers from local resources (young students from the universities, active young elders) - intergeneration relation; • Reinforce the connection with local institutions through partnerships; • Build a network between local institutions, local commerce, active elders and nuns (since the majority of the community is catholic). 	Defend <ul style="list-style-type: none"> • Create a mechanism to inform the population about social support in the parish; • Build a volunteer base to help people leave home; • To overlay the difficulty of isolation cases, create a network between local institutions and residences; • The capacity to empower volunteers and the youth board can break the negative stereotype between generations; • Prevent the isolation problem by involving active elders in the board, giving them responsibilities and objectives of life.
Weaknesses	Decide <ul style="list-style-type: none"> • By receptivity of local institutions create a representative to represent the project in the field; • To build credibility among the community create a partnership with a local institution and involve the active elders in the project; • To overlay the problem of no social experts in the team, the project could build partnership with social institutions who already have these experts; • To engage volunteer families, the project could create information sessions with local partners to sensitize the community. 	Damage control/ Divest <ul style="list-style-type: none"> • No social experts to mitigate and help the cases of dementia.

Table 3: Swot Analysis Grid

b) Competitive Strategic Matrix

The competitive strategic matrix tool (see the matrix in Annex B) designed by Professor MacMillan of Columbia University’s Graduate School of Business has the main

objective to help NPO to assess their programs in the market. The programs were analyzed in terms of “fit with mission”, “potential to attract resources and enhance existing programs”, “alternative coverage” and “competitive position” (See Annex B for a detailed description of the analysis). The main conclusion of program *Signalization Networking* assessment is the investment in the program and in administrative capacity, despite the actual lack of resources, since it could be overlapped by the partnerships. The conclusion taken from the second program *Family and Elderly Relationship* analysis is to “grow or maintain competitive edge strategy”.

5.5 Develop a Strategic plan

a) Core Strategies

The main focus of the project is the relationship between volunteer families and the elderly. In order to ensure successful results and prove the innovation solution, the team board has to focus on this relationship. However, this program can face obstacles in the implementation process, such as the lack of commitment among volunteer families, lack of social working expertise and practical experience by the team board, lack of credibility among the population, limited governance capacity and no physical space to represent the project in the field. To overcome these obstacles, the project created a partnership with ACA which already has social assistants, a psychologist and the governance capacity to support the isolated elders identified in the process. Establish different partnerships to overlay the resources needed are the first main strategy - the project built also a partnership with FITI and PSP to provide information sessions to the families of the community. PSP and Social Support from the NSF congregation will represent the project in the field; if someone wants to know more about the project, he can visit or contact by phone these places and ask for information. To overcome the lack

of expertise of the team and the level of governance, the second strategy is to increase the team board, build an intergenerational team and consequently increase credibility among the community. Further, to overcome the lack of commitment of the volunteer families and decrease the difficulty to identify the isolated elders, the third strategy is to build a signalization networking program which will decrease the lack of information among elder population and mitigate their needs.

b) Program Goals and Objectives

Program I – Signalization networking

The program aims to create awareness in the parish council about the isolation problem issue, promote it among local shopkeepers and local institutions to be aware of the isolation cases and identify them, raise awareness of community families to take care of the ageing neighborhood and stimulate the volunteer activity. The objective is to spread the information through word-of-mouth, in a way to give credibility and trust to the project. To reinforce the credibility, the team could also have support of active elders who live in the parish for a long time and are familiar with the population.

The main objectives are to identify four elders and four volunteer families in the first month of signalization networking to participate in the study; identify in the first two months of ten elders and ten volunteers; increase the neighborhood spirit after six months; maintain the signalization of isolation cases after the three months and reach at least forty people with the first month's information session.

Program II – Family and elderly relationship

The objective of this program is to study four relationships between the volunteer family and the elder during six months. The meetings have to be regular, and minimum

once per week. Moreover, to perceive the triggers of the relationship, the team board will develop and monitor the relationship during this period.

Subsequently the study period, if the assumptions are verified, the project can be scaled-up in the same parish. After six months, the objective is to create a step by step report where it is explained how to implement this solution and the results of the project; afterwards, any parish council or organization can implement a similar project and scale-up the solution.

c) Administrative Functions

Human Resources – The human resources strategy is to attract three members from *Comunidade Nova* and three active young elders residents in the parish to be part of the staff board on a voluntary basis. The main objective is to combine different perceptions and create an intergenerational relationship. With management and new technologies' skills of the Nova students and the local expertise and life experience from active young elders, NPL wants to build a learning and pleasant experience for both parts and a coherent team. The Executive Board is comprised by the three co-founders, which decide the strategic direction for the organization; however, the staff has to be involved in all decisions. The governance will be divided into three departments (See HR organogram in Annex C), and each one will be managed by one co-founder and a pair of volunteers (one student and one elder). The co-founder will work together with the team and will delegate tasks, manage conflicts and represent the department in the organization meetings. Every activity in the organization has to be reported in order to be available for all internal stakeholders, and to build the step by step guide at the end of the study. NPL at this moment is only a start up project and this is the reason why it

does not have capacity to be an IPSS. However, by Portuguese Law, the volunteers have rights, and have a specific regulation that obligates all institutions to give insurance and an identification card to the volunteers²¹. To overcome this situation and give better conditions to the volunteers, ACA will recognize the volunteers and will provide them the insurance and an identification card. The volunteer families will be also official volunteers from ACA, but only after the interview and the training sessions. Each family will have a representative to be the official volunteer.

Marketing and Partnerships - The marketing strategy should focus on the stakeholders and their needs. The positioning and communication plan (more detailed information in Annex D) have to be designed for the different targets:

TARGETS					
		A - Beneficiaries	B - Volunteer Families	C - Community	D - Partners and Funders
Positioning		Elder population who feel alone and is resident in the parish in study	Family is a group of people affiliated by consanguinity, affinity, or co-residence	Include local shopkeepers, residents and local institutions	Potential support institutions
		To beneficiaries who feel alone and are resident in the parish in study, NPL is the project that enables a regular contact with a family geographically close.	To volunteer families who live in the parish, NPL is the project that enables to have an active paper in the community and gives the opportunity to explain in practice the importance of elders care to the children.	To community - local shopkeepers, residents and local institutions, NPL is a project that empowers to take an active role in the community and enables equality, social inclusion and increases the quality of life in the area.	To partners and funders, NPL is a project which offers different services that complement their services and increases the achievement of their mission.
Communication		Word-of-mouth by community; Parish Newsletters; Posters in the local commerce.	Posters in the local commerce; Distribution of flyers in NSF congregation, parish and health center; Facebook and blog.	Distribution of posters and flyers; Regular information session in partnership with FITI and PSP.	Regular newsletter; events to present the evolution of the project; Facebook and online tools.

Table 4: Positioning and communication by targeting

²¹Volunteer Portuguese law information <http://www.voluntariado.pt/left.asp?02.02.01.01>

Partnerships are essential to implement successfully the project, overcome the resources needed, reduce the risks and build credibility and recognition among the community. To identify and select the partner, the project defined a criterion. The partner has to have already experience in the field; the mission should be related to mitigation of the isolation problems, and/ or increase the quality of life of elder population; the partnership has to be benefic for both parties, and should help the partner to fulfill their mission.

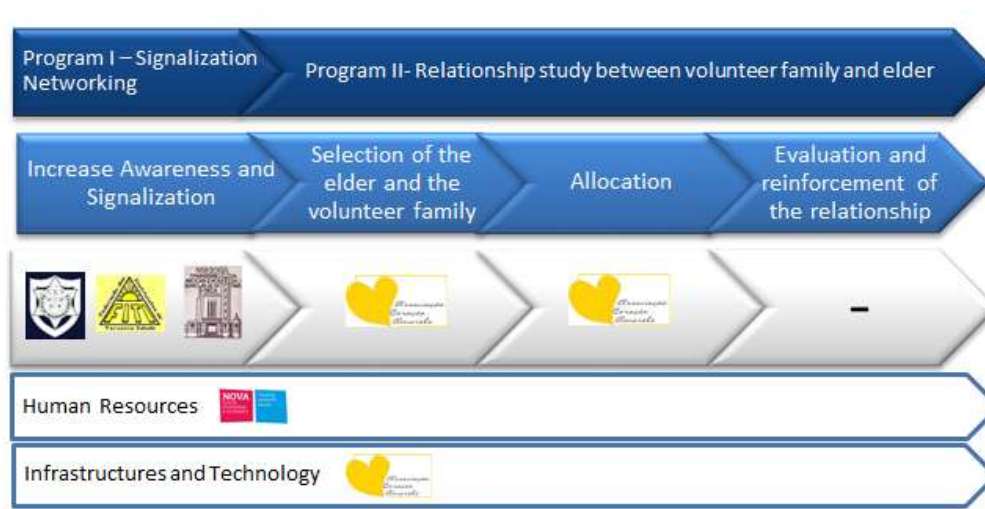



Illustration 1: Program activities and value chain

Partners	Value added to the project	Benefits
Associação Coração Amarelo 	Interview the elders signalized by a social assistant; Interview the volunteer families by a psychologist; Collaboration with allocations; Training sessions to the volunteers, insurance and volunteer identification card;	Increase the number of beneficiaries and volunteers; better fulfill their mission;
Polícia de Segurança Pública 	Collaboration on isolation cases signalization; Support to the communication of the project in the parish;	Better fulfill the mission of the program PIPP (Programa Integrado de Policiamento de Proximidade)
Federação das Instituições de Terceira Idade 	Partnership to create workshops and information sessions to aware the population about the isolation problem, how to prevent and how to signalize.	Better fulfill the mission. Promoting the equality of the citizens by education and knowledge.



Nova SBE – Comunidade Nova 	Partnership to include Nova students in the staff board of the project.	Promote entrepreneurship and solidarity spirit among Nova students. Reinforce soft skills of the students.
Social Support from NSF Congregation 	Collaborate in the communication of the project to the beneficiaries of social shop and food bank.	Mitigate the isolation problem in the parish, and increase the empowerment of the community.

Table 5: Partnerships

Infrastructure: management information systems, technology, and facilities

The infrastructure strategy objective of NPL is to provide adequate facilities that are attractive to beneficiaries and volunteer families, where they can be closer to the project, receive training and attend the information sessions. Further, the facilities ensure that the team (board and staff) have a space where they can have meetings and work together. In the pilot implementation, the project can use different spaces from parish institutions to overlap the cost and at the same time engage the community: class rooms from NovaSBE, venues from Apoio Social or ACA. In the future, F.C. Gulbenkian will create a specific space to locate different projects related to “nosso km²”. Moreover, to ensure the contact with the stakeholders, the project should have a phone to be a permanent contact and a computer to produce the reports, impact assessments and the communication plan. In the initial phase, it can be an option to locate the administrative department in partner organizations to reduce cost, reduce the risks and receive administrative support. For the communication plan it is also necessary paper and a place to print the posters and flyers. To reduce the costs, the project can ask for sponsorship to some private businesses which wants to include this action in their corporate social responsibility and get involved with the community.

Planning, evaluation and quality control – social impact measurement

The plan duration is expected to be eight months (see business plan in Annex E). In the first three months it is expected to implement the first program. The signalization program will occur in a scale up method, meaning that the networking process will be initiated in one neighborhood with an information session and staff members contacts, and after it will continue to another areas. During this process, the interviews to the elders and to the volunteers will start; the elders will be interviewed to understand their needs and interests; and the volunteer families will be interviewed to understand their credibility and interests. In the end, it will be built a database of volunteers and the elders will be forwarded to different institutions, depending on their needs. The volunteer families will have also training sessions.

The second program will have six months of duration and it is expected to start two months after the project begins; however, this depends on the signalization process. In the first two months, the follow up will be done weekly; after that time until the end it will be done twice per month. To the success of the project it is essential to assess the value created and the impact that it will generate in the community and on the target group. It is expected that the impact created will cause positive spillovers over the community in which it will be working on, in the sense that the community will be more sensitive to this problem, alleviating the isolated cases in the future. The impact assessment is also an important tool to learn from results. By assessing the impacts of the project, improvements are able to be done if the concept does not work as expected. In the same way, it is important to show results both to the partners and to investors to clarify expectations. The evaluation and the impact assessment will be measured during the process (see the impact assessment chart in Annex F), through interviews and surveys. After program I, it can be done a survey to understand the awareness of the

project among the community and how they achieve this awareness. Further, the results of the signalization program should also be measured by the number of signalized people and the volunteers. In the program II, impact assessment should be measured with a quality of life survey in the beginning of the program and at the end.

d) Finances

The resources estimated for two years (eight months of the pilot implementation and sixteen months of scale up in the parish):

Financial Resources	1 year		2 year		Non-Financial Resources to overcome the costs
	Qt	Value*	Qt	Value*	
Facilities (rent a space)	1	8500€	1	8500€	Partnership with F.C.Gulbenkian or ACA
Posters (A3 colors)	250	240 €	250	240€	Local business sponsorship
Flyers (A4 black)	500	33 €	500	33€	Local business sponsorship
Administrative supplies	-	600€	-	1200€	Partnership with ACA or local business sponsorship
Executive Board	3	20000€	3	20000€	Volunteer
Staff members	6	39000€	9	59000€	Volunteer
Psychologist	1	7800€	1	7800€	Partnership with ACA
Social Assistant	1	7800€	1	7800€	Partnership with ACA or volunteer

* Estimated average values per year

Table 6: Financial Expenses

Fundraising Plan

Most of the costs will be overcome through partnerships and volunteers. Regarding facilities, the project can reduce this cost by using the facilities of some local institutions such as NSF congregation and also F.C. Gunbenkian facilities. Communication is essential to connect with the community and to attract families to participate. To do that, it is important to print flyers, posters, among other communication materials. The possibility to make a partnership with a local business and using partners' resources, for instance, should be explored to mitigate these costs.

Taking into account the volunteer-partnership approach, it enables its implementation without a significant investment. However, as the project scales up and achieve half of the parish, it may be required a bigger investment to ensure a full time person managing the project. The financial strategy will consist on taking advantage of the existent local facilities and resources and create partnerships with some companies that want to either leverage their image or create social impact in their community. Since the solution is based on value creation and does not pursue any financial return, it was crucial to design it to be as sustainable as possible. However, in the long-term the scale up process can follow other strategies to have funds from the State or financial returns, such as membership fees, or a social business to support the initial project (fees to receive the laundry service, or cleaning provided by unemployed people from the community).

6. Conclusion

NPL is a social entrepreneurship project which is focused on beneficiary and all stakeholders' needs and opinions to create a successful pilot implementation. This strategic plan is based on several interviews and opinions that made it possible to define priorities and the main strategies. The strategies defined in the plan will allow the successful implementation of the pilot by reducing risks and take advantages of the opportunities in the market. One of the most important strategies was the creation of a new signalization networking program. The program reduces the inability to achieve the isolated elders by the word-of-mouth communication strategy and increases awareness about the neighborhood situation (look for the next door). The community engagement increases safety and quality of life of the beneficiary. Moreover, the program increases awareness of community families to the relevance of taking care of ageing people and family past generations. The long-term objectives for the project are the networking

signalization to become sustainable and that the population by themselves is able to signalize isolation cases, and that future generations learn the elder care importance. The new program increases the impact of the NPL project, since it not only affects four elders and families but will signalize more than that and will also bring high benefits for our principal partner, ACA, since it will have more volunteers and more beneficiaries. The signalization program increases the dimension of the pilot and consequently decreases the administrative capacity. The human resources strategy overcomes this situation by establishing the staff organization and administration. The strategy is to have an intergenerational team to generate share of experiences and know-how with the objective of reducing the existing barriers between these two generations. The communication and infrastructure strategy also reinforces the share of experiences and ideas through the word-of-mouth communication method and the share of facilities with local partners. The sustainability of the project is fundamental to the implementation success. Moreover, the executive board believes that in a social sector there should not exist duplication of services and resources, and the institutions should work together to achieve the social benefit. By these assumptions and to overcome the resources needed for the implementation phase, the project builds strong partnerships with some local institutions as a way to reinforce credibility in the community.

The design of the strategic plan during the last six months was fundamental for the project since able to understand the environment and define with partners and residents the future strategies and partnerships. The different tools used in the thesis were adequate, not only for NPL but also for the social sector. This strategic plan it is one more tool to makes NPL growth in the future and consequently mitigate the isolation problem.

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A Work Project, presented as part of the requirements for the Award of a Masters
Degree in Management from the Nova – School of Business and Economics

Annexes to Work Project

Social Entrepreneurship Project “Na Porta ao Lado”: Strategic Plan

MARTA FILIPA JANUÁRIO DA SILVA

#820

Project carried out on the area of Social Entrepreneurship, under the supervision of:

Prof. Miguel Alves Martins

7th January 2013

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1. Annex A – PEST Analysis

External Environmental

Demographic Factors – F. C. Gulbenkian is one of the institutions localized in NSF Parish. Under the project “O nosso km” which aims to create networking contacts in the community and makes them more effective, the foundation in the first stage decided to focus in elderly issues and study the population in the parish over 65 years old. The strategy is to focus on the needs and opinion of community instead to work on institutions opinions. In partnership with CESSS from Católica University and SCML, between 5 of March and 6 of May of 2012 were interviewed 502 persons however, 11 were invalid due to the criteria of age or residence area. It were 70% of woman and 30% of men, 24% of the interviewed has between 80 to 84 years old, 46% are married and 34% are widower. 198 of the elderly interviewed (41%) are in isolation of those 43 are single and 121 are widower. 79% of the interviewed leave only with other elder. The main conclusion from this study:

- Socio-economic conditions: it was identified two different profiles, ones with low qualifications and others with education; Two thirds of the sample does not receive more than 650€ per month and one third receive less than 350€. The main expenses are with house, food and health; Only 4% receives the CSI¹, 34% does not receive because did not know about it - **One of the difficulties of the age group is the ignorance about services and support.**

¹ Complemento solidário para idosos

- Housing conditions: in terms of housing, 65% of the houses do not have elevator that is a major constrain to leave home for this age group – **Difficulties to leave home without help.**
- Family and Social relations: 90% of the cases are satisfied with them relations; however 20% to 30% of the interviewed has less relation than desired with friends (28,7%), family (22,1%) and neighbor (19,8%). The main daily activities are domestic load and entertainment (watch TV, read, walk and listen radio); could be identify two profiles, the “**young elderly**” who are more active (walk, learn makes sports and volunteer), and “very old” who are less active by the health problems (watch TV, read and listen radio); the income also influence the daily activities, the elderly with high income have more active activities (sports, travel, classes).
- One third of the sample does not have future concerns; **42% people from the sample feels alone**, 48% in depression and distress and 34% with fear. The main concerns are the health (66%), family (62%) and security (60%).
- Elderly until 69 years – the “young elderly” wants to learn new subjects (61%), work (57%) and makes plans for the future (42%) – could be conclude that “**young elderly**” are actives and with capacities and desires to participate in society with volunteer work or learn new subjects.
- Health situation – 80% of the sample affirm that have health problem, from those 80%, **28% have mobility problems**; 70% walk by foot, 45% by public transports and 25% by own car.
- Support requirements - According with the sample, **the payments and fulfill documents (25,2%), shopping (21,2%),** cooking and domestic load (20,2%), climb

the stairs (17,3%) and walking on streets (16%) are the activities where the target have more difficulties. **The support is made by another elderly** (40% of the cases); Most of the sample do not know social support in the parish– 70% refectory, 37% homecare service, 24% day center and 31% retirement home; Again, can be identified two different profiles, the ones with higher income and education who enjoy from the cultural services and the ones with less income and education who consume more support services like daily center, homecare services or refectory. It was also identify the main need of the elderly population in the parish, security (51%) and transports (30%) were the main problems. Another conclusion from the study is the **importance of communication to the current services in the parish**, since the population does not know them.

Political, Legal and Economic Factors - “As life expectancy increases across Europe, pension ages are raising”² that makes fear on the older workers that could not be able to stay in their current jobs until the retirement age. “The employment rate of older workers in many EU Member is far too low. This is due to the discrimination faced by older people in the labor market”³. The economic crisis makes the pensions decreasing and the income is an important co-factor of isolation feeling, since the higher income groups could pay for several services and support.⁴ This issues were highlighted in 2012, nominated the European year of Active Ageing, and were “intended to raise awareness of the contribution that older people make to society. It seeks to encourage policymakers and relevant stakeholders at all levels to take action with the aim of

² <http://europa.eu/ey2012/ey2012main.jsp?catId=971&langId=en>

³ Age – the European Older People’s Platform. 2008-2010. Triennial Strategic Plan.

⁴ Fundação Calouste Gulbekian. 2008. Isolation in Older Age: Report on expert seminar held in October 2008

creating better opportunities for active ageing and strengthening solidarity between generations.”⁵

Technological - “The demographic changes that are likely to be experienced across the EU in the coming decades also present an opportunity for the development of new products and services that are geared to the needs of older people. There is potential for a wider range of new technologies to be developed that could allow older people to stay autonomous and live longer in their own homes, to transform the delivery of care, or to personalize services in response to patients’ needs.”⁶

2. Annex B – Competitive Strategic Matrix

		Ability to attract resources and enhance existing programs YES		Ability to attract resources and enhance existing programs NO	
		Alternative Coverage: MANY	Alternative Coverage: FEW	Alternative Coverage: MANY	Alternative Coverage: FEW
GOOD FIT	Strong competitive position YES	1) Growth or maintaining competitive edge strategy	4) Growth or maintaining competitive edge strategy	5) Build up best competitor assist another organization provide the service	8) Soul of the agency
	Strong competitive position NO	2) Develop and implement an exit strategy	3) Invest in program and administrative capacity or develop and implement exit strategy	6) Develop and implement exit strategy	7) Collaboration strategy
POOR FIT		Divest or do not start to provide this service			

Table 1: Competitive Strategic Matrix - Source: Adopted from I.C. Macmillan, “Competitive Strategies for Non-for-Profit Agencies,” *Advances in Strategic Management* 1 (London: JAI Press Inc., 1983), pp. 61-62

⁵ <http://europa.eu/ey2012/ey2012main.jsp?catId=971&langId=en>

⁶ Eurostat Statistical Books. 2012 Edition. Active ageing and solidarity between generations – A Statistical portrait of the European Union 2012.

Program I – Signalization Networking

The signalization networking program aims to create awareness in the parish council about the isolation problem, promote among local shopkeepers and local institution to be aware of the isolation cases and identify them, raise awareness of the community families to take care of the ageing neighborhood and stimulate the volunteer activity.

The program is empowered by the board and volunteer staff which in the first stage connect with different local institution and further, street by street, the volunteer staff publishes the project during 3 months through talking with local shopkeepers, deliver flyers and posters. The objective is to spread the information by word of mouth, in the way to give credibility and trust to the project. To reinforce the credibility, the team could also have support of active elders who live in the parish for a long time and are familiar with population. Furthermore, in the way to emphasize the communication of the isolation issues and the project, could be made in partnership workshops or discussion groups with different community associations.

1. Fit with mission (YES) - The signalization networking allows awareness about the problem and therefore the mitigation of the isolation cases. Moreover helps to build the relationship between the beneficiaries and the community.

2. Potential to attract resources and enhance existing programs (YES) – The program can attract resources by partnership with some local institutions such as volunteer team from NovaSBE or other university localized in the parish; ageing specialist instructor from FITI⁷.

⁷ Federação das Instituições de Terceira Idade

3. Alternative coverage (FEW) – The PSP occasionally promotes some talks in the way to prevent isolation but also burglaries. However does not have a related program in the parish.

4. Competitive position (NO) – NPL does not have past experience and this type of service can be provided by the parish council.

Result: 3) Invest in program and administrative capacity or develop and implement an exit Strategy – Despite actual lack of resources, it could be overlap by the partnerships and association with strong leaders in the community.

Program II – Family and elderly relationship

The Relationship Program is the main program and intends to prove several assumption of the innovative solution built to mitigate the isolation problem. The connection between an elder and a volunteer is already proved by the ACA, however NPL wants to understand if it possible to build a regular relationship between an elder and a volunteer family who live closer geographically and are from the same community. It will be considered family a group of people affiliated by consanguinity, affinity, or co-residence⁸.

The aim of the program is to better integrate the elderly in the society, mitigate the isolation feeling, increase the perception of security, provide the personal and regular relationship, empower the community families to mitigate the social problem in them parish and help to nurture them children for the relevance of elder people in the society.

Further identify the volunteer families, the board team (composed by someone who already knows the community) and psychologist will interview the family and

⁸ <http://en.wikipedia.org/wiki/Family>

understand their profile and interests. One of the elements of the family will be responsible and be the official volunteer. Additionally all elements will receive training about the project and the partner organizations, the rights and obligations of volunteer, the rules in the relationship, ageing and how to build some activities. Meanwhile the elder will be interviewed by the social assistant to understand their needs and interests. At the end, it will be created two databases with the beneficiaries and with the volunteers. The match between both it will be made essentially by the interest and further by the geographical proximity.

The first meeting will be followed by team, and the future meetings will be reported to the organization by both parts. The relationship will be studied during six months, in the way to understand the feelings and the connections created in the meetings and prevent some relationship problems.

1. Fit with mission (YES) – the relationship completely fits with the mission in the way that pretend to join the elder in the community and reduce the isolation feeling. Moreover has the ability to share resources and coordinate activities with other programs and other organizations.

2. Potential to attract resources and enhance existing programs (YES) – To increase the capacity to appeal volunteers and attract resources, the project creates different partnerships with local institutions and build the second program to reinforce the awareness of the problem.

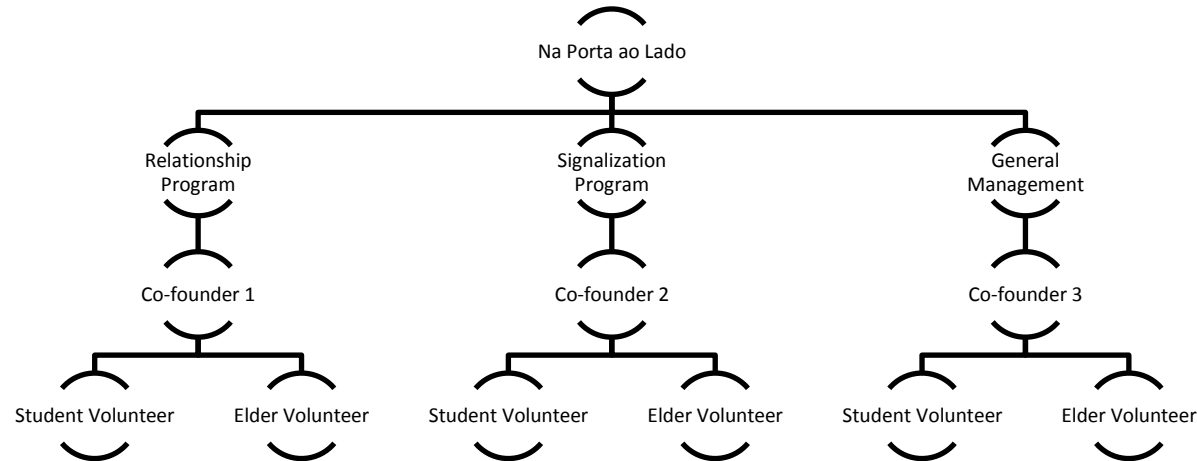
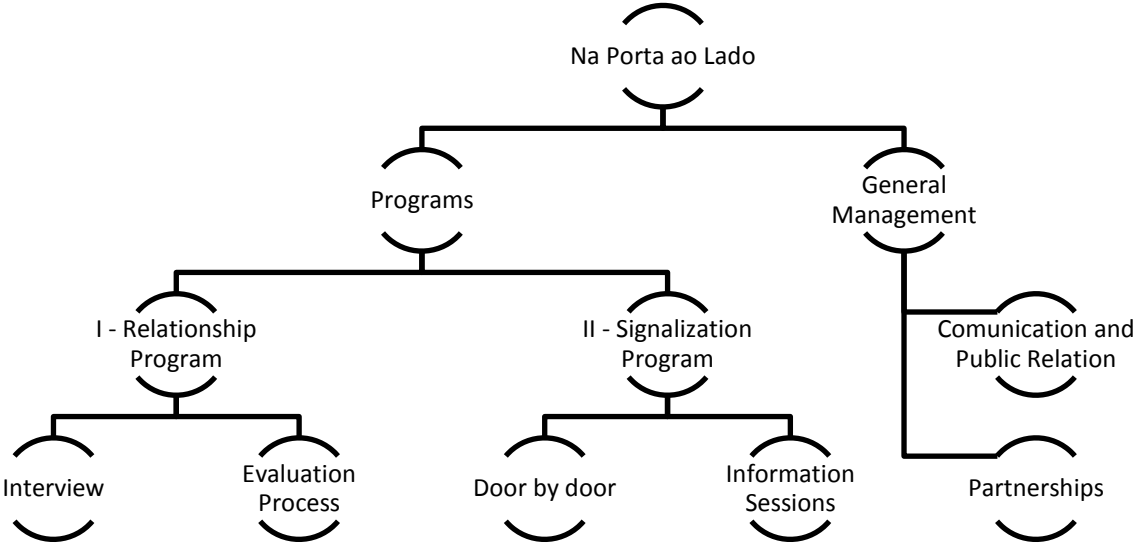
3. Alternative coverage (FEW) – the ACA provide the similar service in the parish that could substitute NPL service, however doesn't bring the same benefits for both parts.

4. Competitive position (YES) - The competitive position means “the degree to which the organization has a stronger capacity and potential to deliver the program than other”.

NPL is the unique organization who provides this service and in partnership has a strong capacity to deliver a quality service.

Result: 4) Growth or maintain competitive edge strategy.

3. Annex C – Human Resources Organograms



4. Annex D – Communication Plan

- Beneficiaries (elder population) – The beneficiaries are isolated and usually they build a barriers to external communication, to reach the target it is important to build trust, and brake these barriers. The easy way to reach trust is communicate by someone who already transmits confidence, and have a relationship with the elders. The objective is sensitizing active elders, residents and local shopkeepers, to be aware of the isolation cases, and announce the project by worth of mouth to them friends and regular clients. Thereby, the project is recommended by someone known, and is not imposed by someone unknown. Moreover to reach the elders who are isolated but have contact with some social institutions (Social support from NSF congregation, re-food and social assistants), the project wants to have close relationship with these professional to spread the service and reach more people.
- Community (local shopkeepers, residents, local institutions) – the community has a relevant role in the communication of the project among the elders. In the first stage, the communication with will be made street by street. The volunteer staff will identify each local shopkeeper, inform them about the project and the problem and also will distribute posters and flyers. Further, to better reach this target, the project will build partnerships to bring more expertise and credibility with PSP and FITI. With these partners, it will be created in the parish several information sessions for different representatives with the aim to inform about the ageing and isolation problems, security and how to signalize the cases. Moreover the project could be announced regularly in the parish newsletter and information posters in the parish.
- Volunteer families – the volunteer families will be reached also by the community communication tools. When the project and the isolation problems are

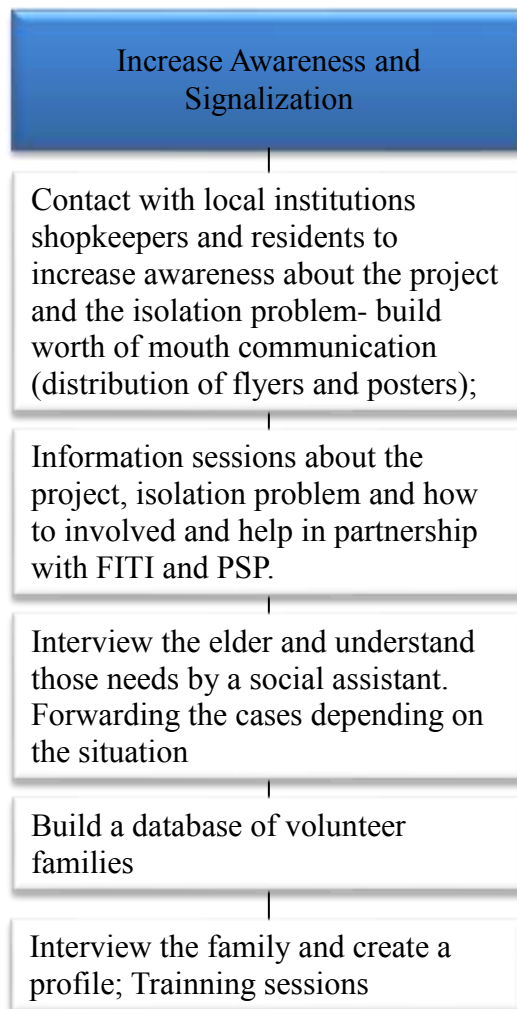
communicated, also will be informed how the community can help and become a volunteer.

- Partner institutions, funders and potential support institutions - to communicate the evolution of the process and attract future partnerships, the organization will produce and send by email a newsletter in regular basis. To promote the relation between partners and a close relationship with the staff, the organization will establish two events where joins all partners with the aim to announce the objectives, future strategies (first event in the beginning of the study), results and impact assessment (in the second session at the end of the study).

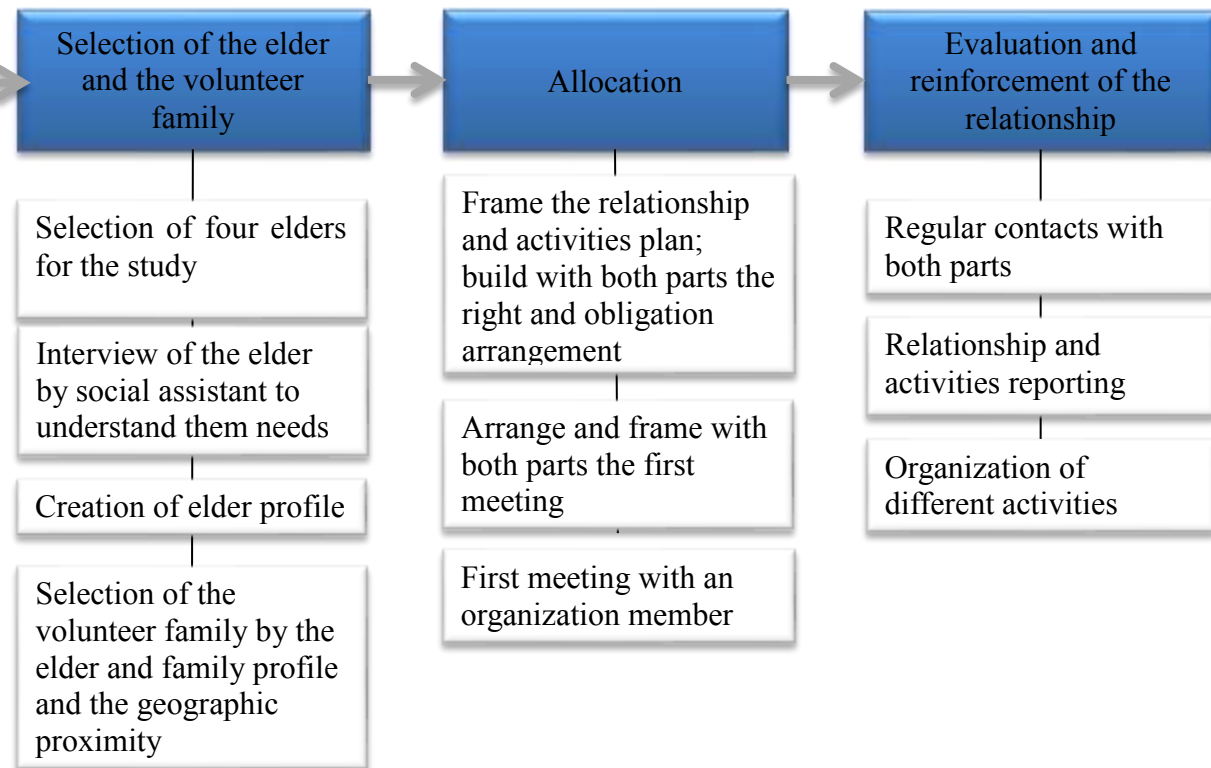
Moreover to create awareness, the project will use social media such as Facebook and Blog. The goals is to promote the project among students, volunteer families, funders, partners and anyone interested by the issue, in the way to share ideas and awareness the society for the isolation problem.

5. Annex E – Business Process

Program I – Signalization Networking



Program II- Relationship study between volunteer family and elder



6. Annex F – Impact Assessment

Measures	Goals
Elder	
<u>Output:</u>	
# of elders signalized by the networking program (per month)	At least 10
# of elders signalized supported with other local institution	At least 5
# of elders in the second program – Relationship study	4
# allocations between the elder and volunteer family	4
<u>Outcomes:</u>	
# meetings per week	At least 1
# hours of the elder and the family stay together	At least 1h
# activities done per month	At least 1
<u>Impact:</u>	
# of elders join activities	At least 2
The elder security perception (measure by the scale 1 to 5)	Increase
# of times the elader leave home	Increase
Volunteer Families	
<u>Outputs:</u>	
# of new volunteers in the parish	At least 10
# of families participating in the study program	4
# allocation between the elder and volunteer family	4
<u>Outcomes:</u>	
# hours of meetings per week	At least 1h
# meetings per week	At least 1
<u>Impact:</u>	
# of times per month the elder take cares of the children	At least 2
# of times children ask for visit the elder	At least 1
# of times the family invite the elder to do a specific activity	At least 1